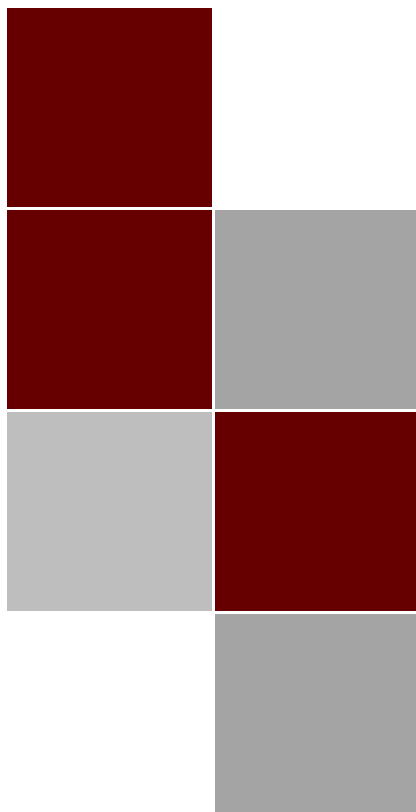




ILRI
INTERNATIONAL
LIVESTOCK RESEARCH
INSTITUTE



Planning for Communications and Knowledge Management

November 2017

Projects at the International Livestock Research Institute (ILRI) are typically implemented with national and international partners in many countries. Teams produce research findings designed to enhance existing knowledge and generate positive change in the lives of ILRI's target beneficiaries and other stakeholders. As part of this process, teams develop theories of change which help outline how they plan to achieve their expected outcomes—such as developing partner capacities, ensuring science take and influencing decision making processes. They help projects understand not only how their outcomes will be achieved, but who needs to be involved.

This can be a complex process, much of it outside the direct influence of researchers. Communications and Knowledge Management (CKM) helps bridge this gap. CKM activities help make science available to target audiences—both within and outside ILRI—and persuade stakeholders to take on activities and change their practices.

Scientists frequently plan meetings and training sessions. These planning and feedback meetings help to incorporate the views of key stakeholders into project work activities, and facilitate coordination throughout the institute. Training and demonstrations help to enhance partner capacities to implement the work into the future. The proceedings—if documented and stored on the ILRI institutional repository—can be shared with larger target audiences in the future. If this work is reported on by the media, published in blogs and shared on social media, its reach can be expanded significantly.

These knowledge management, communications and information exchange functions—targeting internal ILRI and external stakeholders—include information and document management, event and process facilitation, publishing, public awareness, web communications, online communications, use of social media, support to innovation processes and platforms, multimedia reporting, communities of practice and networks, and monitoring and impact assessment in these areas.

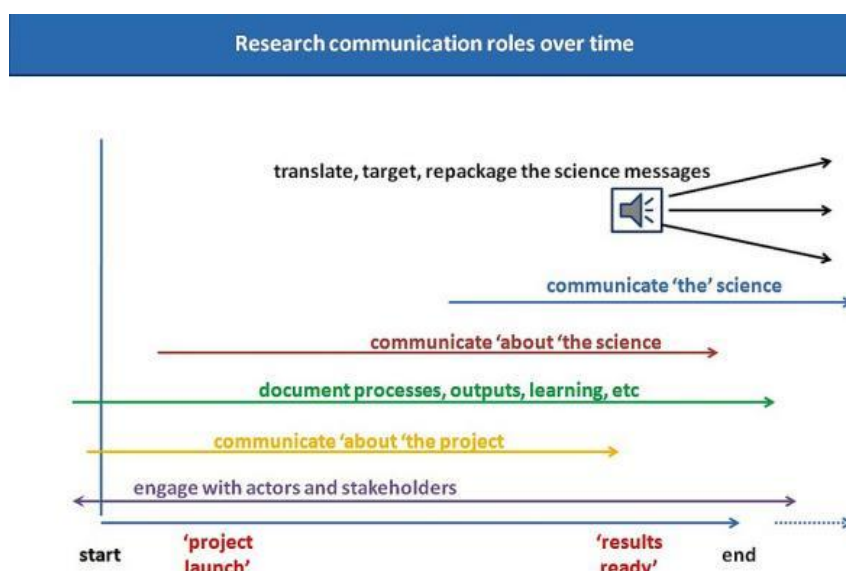
Designing and implementing such activities can be complex and time consuming. Efficient use of ILRI resources means this work needs to be planned and budgeted. We need to be precise about how we communicate our work. The content produced needs to be relevant to the audiences targeted, so scientists need to determine:

1. **What** we are trying to communicate, the message. The information needs to be tailored for the target audience, making it understandable and relevant. Understanding the complexity of what we need to communicate will help us determine the resources and time required. For instance, sharing research reports with colleagues will require less additional work for scientists than producing literature for farmers or the media.
2. **When** the communication will happen. Some activities will have many steps. For example, meetings can require agendas, invitations, minutes, reports, blogs, media interviews, etc. Some activities will need to be repeated over and over again.
3. **Why** we are communicating, making it relevant for target audiences. All communications should have an objective, otherwise it won't be possible to ensure it achieves its intended outcomes.
4. **How** the medium or combination of media we will use to communicate, e.g. meeting, reports, TV, radio, training, etc. This too will help scientists plan and budget their activities and time.
5. **Who** is responsible for the communication? Do projects need the assistance of CKM experts?

These activities require planning so there is enough time for all who should be involved to participate. Last minute requests for the participation of stakeholders may not be successful. The activities should be documented and archived, making the knowledge available to users unable to participate. Archiving materials reduces future costs as other projects will not have to reinvent the wheel every time similar activities occur.

Communications and Knowledge Management (CKM) lifecycle

Successful CKM activities take place before, during and after a project takes place. The graphic below illustrates some higher-level typical activities projects engage in and shows how they will change over time. It is useful to differentiate among 'communication about a project', 'communicating about the science' and 'communicating the science.' All are needed; all are important; they tend to vary in importance over time. Communications and engagement activities among project partners and stakeholders need to be planned for explicitly.



This template explains some of the key steps necessary to plan and deliver communications and knowledge management (CKM¹) activities for an ILRI project to optimize research-for-development benefits. Like other CGIAR centres, ILRI aims to invest strategically in knowledge sharing and communication in support of its institutional, regional, program and project goals. ILRI project investments² typically seek to ensure the following objectives:

- Communicate evidence for wider influence³—by engaging with and influencing decision-makers and other audiences⁴
- Translate science-based practices into impact—by communicating research outputs into potential development outcomes, get knowledge into use⁵
- Link and connect people and knowledge to enrich collaboration, learning, interaction and knowledge exchange⁶
- Access, organize and manage, document, publish, communicate and disseminate research knowledge, information and data, products and outputs for wide accessibility and use⁷.

¹ The term ILRI CKM (communications and knowledge management) unit is employed to distinguish the ILRI team from the activities.

² If the situation warrants it, these investments have their own dedicated communications expertise/capacities. They are normally supported by institutional expertise, platforms and workflows that provide a consistent framework across projects.

³ Activities may include developing basic materials about the project; establishing a website; making use of social communication approaches and tools that foster interaction between stakeholders; taking key messages to wider audiences through alliances, networks; and engaging with the media.

⁴ For more detail on typical ILRI audiences, see <https://ilri-comms.wikispaces.com/typical+ILRI+audiences>.

⁵ Activities may include empowering stakeholders to document, share, exchange and use knowledge; engaging with stakeholders using participatory communication approaches and tools and inclusive 'system' approaches like innovation 'platforms', learning 'networks' or alliances; using accessible ICTs (mobiles especially) and multimedia (radio, video, audio) to extend the reach of research messages to intermediary stakeholder and ultimate beneficiaries; making wide use of existing face-to-face and traditional communication media, such as field days, policy briefings and multi-stakeholder workshops.

⁶ Ensure that communications processes and approaches capture, document and make greater use of tacit knowledge, that knowledge is exchanged in innovative ways using social and participatory media, and that partners are brought together through multi-stakeholder platforms.

⁷ ILRI. 2016. ILRI research publishing procedure 6: Open access checklist. Nairobi, Kenya: ILRI. <http://hdl.handle.net/10568/63491>.

CKM and the PMF lifecycle

The starting point should be the project lifecycle in the PMF. The ILRI CKM unit has a specific set of activities in each.

PMF phase	Key CKM actions	Deliverables, inputs to:	ILRI CKM unit activity packages
Proposal development	<ol style="list-style-type: none"> 1. Facilitate and support stakeholder engagement, events, documentation 2. Specify CKM outcomes, audiences, actions and budgets 	<ul style="list-style-type: none"> • Stakeholder process • Concept note document • Proposal document, including budget • Project design events • CKM strategy/plans 	<ul style="list-style-type: none"> • No. 2 • No. 3 • No. 7
Planning	<ol style="list-style-type: none"> 1. Facilitate and support partner engagement, events, documentation 2. Specify CKM plan, actions and budgets 3. Support project team collaboration 4. Communicate ABOUT the project 	<ul style="list-style-type: none"> • Project and CKM work plans and budgets • Project collaboration tools and support package • Project design and inception events 	<ul style="list-style-type: none"> • No. 2 • No. 3 • No. 4 • No. 9
Executing	<ol style="list-style-type: none"> 1. Facilitate and support partner and stakeholder engagement, events, learning, documentation 2. Monitor CKM plan, actions and budgets 3. Deliver CKM activities and products 4. Support project team collaboration 5. Communicate ABOUT the project / Communicate ABOUT the science / Communicate THE science 	<ul style="list-style-type: none"> • Project collaboration tools and internal comms support • Project external communications tools • Project publishing products • Project reporting products • Project awareness, advocacy and media products and activities • Project curation and repository support—open access information products • CKM work plans and reports • Project review and planning events • Project learning and/or science events 	<ul style="list-style-type: none"> • No. 1 • No. 2 • No. 3 • No. 4 • No. 5 • No. 6 • No. 7 • No. 8
Closing	<ol style="list-style-type: none"> 1. Facilitate and support partner and stakeholder engagement, events, documentation 2. Evaluate and assess CKM activities and products 3. Support project team synthesis, lessons learned, collaboration 4. Communicate THE science 	<ul style="list-style-type: none"> • Project collaboration tools and internal comms support • Project publishing products • Project reporting products • Science awareness and media products and activities • Project archive—open access information products • Project synthesis and dissemination, scaling activities • Project knowledge legacy access 	<ul style="list-style-type: none"> • No. 1 • No. 2 • No. 3 • No. 4 • No. 5 • No. 6 • No. 7 • No. 8
Support resources for this work	<ul style="list-style-type: none"> • ILRI finance budget templates and guidance for project budgeting • ILRI comms wiki with guidance, FAQ, support on branding, tools • Publishing procedures and guidance on CGSpace • Maarifa blog with lessons and insights • Various resources e.g. Yammer guidelines, CoP support guidelines etc. 		

Typical packages of ILRI CKM unit activities

1. Public awareness and advocacy

ILRI public awareness and advocacy work frames issues, raises awareness of livestock-related issues in low-income countries, builds greater support for pro-poor livestock research for development and helps make ILRI science stories 'stick'. This work is undertaken through strategic, targeted communications and campaigns. While many of ILRI's publishing outputs are tailored to the needs of project audiences, selected ILRI research and research products are communicated to meet corporate, as well as program and project objectives, often framing issues for development experts or to influence key debates and conversations. These products are disseminated among key ILRI key audiences, including journalists, government officials, donor agents, NGOs and other development actors. This work includes development of communications plans and dissemination strategies, as well as production of original materials, such as opinion pieces, letters to the editor, slide presentations, photo-essays and the like.

2. Collaboration platforms and support

Effective use of collaboration tools and approaches is a prerequisite for effective partnerships. Such tools and approaches help to realize and sustain the value of collective thinking and capacity. ILRI does not work in isolation; it must develop and sustain strong working relationships and cooperation with a wide range of other institutions—local, national and international. Collaboration is key to enable people to work well together. Activities in this area include testing, setting up, running and assessing collaboration platforms and processes, and advising, training, supporting and coaching project teams and staff on effective collaboration.

3. Process (event) facilitation, learning and support

Engagement facilitates learning and knowledge sharing across ILRI and with key stakeholders. It is also important in the process of identifying key stakeholders, and the changes in behaviour the project wishes to bring about, and ensuring this information is embedded in the wider project formulation, design and planning process. As meetings and workshops require significant investment of resources, the ILRI CKM unit seeks to enhance the quality of these processes through more engaging meetings, with active participation and greater ownership of results, richer interactions with partners and clearer expectations about realistic outcomes that can and will be achieved through these meetings. These activities—bringing together communities of practice, networks, etc. through face-to-face events and virtually—help identify key CKM and wider project objectives with clear activities and impact pathways which contribute to wider project outcomes, i.e. the theory of change. Key activities include: design of events, conversations, and consultation and other processes—e.g. agenda design, brainstorming, etc.; facilitation of events and moderation of conversations, e.g. workshops, team meetings, communities of practices, etc.; formal documentation of events, e.g. event reports on ILRI and partner wikis; and informal social reporting of events on social media, e.g. on Yammer, Flickr, YouTube, etc.

4. Social engagement support

Where appropriate, we combine event facilitation with social media to try and engage with people not 'in the room'; we ensure that all the outputs and presentations in a meeting are documented and captured, and we have experimented with multi-media reports and graphic facilitation and reporting. Aside from better participation, we also support processes and tools that help to document and capture project insights and lessons, most significant changes, as they happen, as an aid to future reviewing. We especially try to tap into and document the tacit knowledge of individuals to enrich the collective insights of project teams.

5. Internal communication support

Projects frequently give insufficient attention to tools and platforms and workflows that support internal communications and updates. The ILRI CKM unit seeks to put in place a combination of face-to-face and electronic tools/applications to support communication across the project teams. This is likely to include electronic collaboration spaces to track agenda and activities (such as a wiki; online calendar); the document repository mentioned above; closed communication spaces (such as Yammer); email; and well-facilitated and documented project meetings. We aim that our communications channels, where possible, serve internal and external audiences. We have made much use of Yammer (a sort of company Facebook) to encourage sharing within and across teams. We also made much use of wikis as accessible platforms to share documents, agendas, and plans; these also serve as project archives⁸.

⁸ See <http://africa-rising.wikispaces.com> for an example.

6. Media, campaigns and influencing for big events and products

While much of the ‘heavy lifting’ in face-to-face influencing, with senior policymakers or investors for example, is done by senior ILRI scientists and managers, this work is insufficient for ensuring that livestock-R4D impacts poor people at scale. For this reason, ILRI engages with many media organizations to amplify its perspectives, knowledge, recommendations and messages. In addition to promulgating ILRI knowledge on ILRI’s *corporate news and clippings blog sites*, ILRI publishes its material, including opinion pieces, on other influential sites to widen readership and influence. In the *News media*, ILRI works with news media consultants to promote important findings via influential news, science, specialized and mass media outlets. Products include press releases, factsheets, background papers, staff profiles, etc. In *social media*, ILRI engages a wider array of influential people and media organizations through strategic engagement on popular social media platforms. *Multimedia* products include image-rich messaging, audio podcasts and brief video products. ILRI also conducts its advocacy and influencing work in intentional ‘campaigns’ agreed upon by project leaders and communicators, from small to large in size and duration, depending on the expressed needs of projects and management and budgets. Special care is taken to ensure that matters potentially of a sensitive nature to one or more of our stakeholder groups are communicated in ways designed to support rather than damage ILRI’s partners and pro-poor agenda.

7. Multimedia and print publishing

Publishing activities support knowledge generation by capturing, documenting, synthesizing, translating and disseminating information for wide impact. They include all aspects of support to processes to create, co-create, capture, document and disseminate ILRI’s knowledge through various products. In the first instance, they include support to research teams helping them specify their publishing needs and plans in relation to their audiences and goals. ILRI teams develop and make available guidelines and tools—editorial style guidelines, logo use, publication templates—to researchers to communicate, and provide support in drafting, writing, editing, proofreading, fact-checking, designing, illustrating, typesetting, branding, summarizing, abstracting, audio recording, filming and photographing. Teams also help organize writeshops to produce key learning and synthesis documents; and disseminate ILRI products to wider audiences through publication of ILRI blogs and other social media platforms.

8. Open access curation and publishing

Curation activities support knowledge generation by ensuring easy and permanent open access. The focus here is on the systems, workflows and channels necessary to access and widely disseminate this knowledge across ILRI and beyond. They ensure that external knowledge needed by ILRI, in journals for example, is accessible to staff. It involves all aspects of information management, including collecting, organizing, curating, indexing, tagging, categorizing and distributing content. At present, all ILRI products are published and indexed in CGSpace (<http://cgspace.cgiar.org>). Using this platform ensures that ILRI meets its open access commitments for information products (a similar approach is being followed for data). CGSpace serves as publishing platform, archive, and reporting system. Multi-media products like video are typically published on platforms like YouTube for wide access and re-use. Using open systems and standards ensure that ILRI’s products can easily be aggregated and curated across other web services and platforms.

9. Web and digital platforms and tools

ILRI has set up project web sites for most of its larger projects⁹. We usually use a WordPress (blogging) platform for this as it allows many authors to contribute updates; the resulting messages are visible on search engines and the WordPress platform allows for easy customization and many social/commenting features. Content from these web sites moves easily and widely across social media like Twitter, Facebook, etc. We seek to produce updates and messages on all project activities and decisions building up interest over time—not waiting for the ‘results’ to arrive¹⁰. Investors especially want updates on money spent and progress made, while documenting choices and priorities serves to engage with potential partners and audiences (so they are aware of a project before it starts to deliver). Activities include design and management of, and training on the use of websites, blogs and wikis, etc.

⁹ See for instance: <http://www.ilvac.net>; <http://lives-ethiopia.org>; <http://livestockfish.cgiar.org>; <http://safefoodfairfood.ilri.org>

¹⁰ See: <http://maarifa.ilri.org/2012/02/10/sustaining-agri-water-research-communication-efforts-over-time>

Annex I: Cost estimate for CKM activities

The production of some communications products is mandatory to guarantee a minimum level of quality and an optimal amount of exposure for the institute. Each project should also budget for the time of a communications person to coordinate and facilitate general CKM activities. Other CKM products can be planned on voluntary basis.

Mandatory products

Total cost: mandatory CKM products
Of which FTE costs*

Mandatory CKM staff time

Total project budget

0–200K	200–600K	600k–1.5M	>1.5M
-	20,100	50,540	82,060
	13,100	28,850	49,035

Per year, budget 1% of total budget amount

Or when >1.5M: 0.1 FTE per 500K budget (1 FTE = 50k/y)

The maximum cost for mandatory staff time equals one full-time equivalent (FTE) or USD 50,000 per year (for projects with budgets over USD 1.5 million). This charge excludes the costs of producing these mandatory products (see estimates below).

Depending on donor requirements, projects may be able to budget CKM activities under activity costs, or present the FTE as staff costs. This especially makes sense for budgets over USD 1.5 million. To calculate FTE from staff costs, divide the total mandatory costs by the number of contract years and divide by USD 75,000 (1 year FTE = 75K). To calculate from staff costs to FTE, divide the total mandatory costs by the number of contract years and then by 75K to give you the annual FTE you should add. (1 year FTE = 75K). For the mandatory staff time you can calculate with 40K/year per FTE, because this is always NRS staff.

Example: A project with a total budget of 2M over 3 years, needs to budget USD 82,060 for mandatory products (spread out over the years), plus USD 20,000 or 0.5 FTE per year for mandatory staff. In addition, you can add costs and/or FTE for additional voluntary products.

In case of doubt, contact the ILRI CKM unit (James Stapleton) to help you estimate these costs. **Be careful**, if you don't plan any budget, CKM might be unable to provide you any services once the project starts, or services might end up more expensive.

Depending of the total project size, the following **mandatory** and **staff** costs should be budgeted for. The basic one-off set up always happens at the start of the project; outputs can come at any stage and costs may need to be spread across years; some costs recur each year. These costs are based on standard ILRI CKM unit activities, estimated across many ILRI projects. Always seek an estimate for special activities (e.g. a commercially-published book) to confirm actual costs up front (see ILRI Research Publishing Guideline 7 for procedures¹¹).

Mandatory product costs

Small project: Total budget = 200–600K;	Mandatory products	Total required	Of which FTE	Of which Operational	CKM unit activity package
Project basic comms set up: flyers, posters (2), web set up, CGSpace		1,350	1,350		No.s 7, 8 and 9
Project outputs: news (3), reports (1), briefs (3), articles (1)		9,900	6,900	3,000	
Project engagement: events, media		2,450	2,450		No.s 3 and 4
CKM plan (as per PMF)		2,400	2,400		
Materials, supplies and services		4,000		4,000	
Total costs		20,100	13,100	7,000	
Project general comms coordination and delivery → add 1% of total budget per year for additional NRS comms time					

Medium project: Total budget = 600K–1.5M;	Mandatory products	Total required	Of which FTE	Of which operational	CKM unit activity package
Project basic comms set up: flyers, posters (3), web set up, CGSpace		1,900	1,900		No.s 7, 8 and 9
Project outputs: news (6), reports (2), briefs (5), articles (2)		24,100	18,100	6,000	
Project engagement: events, media		8,850	8,850		No.s 3 and 4
CKM plan (as per PMF)		3,600		3,600	
Materials, supplies and services		12,000		12,000	
Total costs		50,450	28,850	21,600	
Project general comms coordination and delivery → add 1% of total budget (or 0.1 FTE per 500K) per year for additional NRS comms time					

¹¹ <http://hdl.handle.net/10568/75854>

Large project: Total budget >1.5M;	Mandatory products	Total required	Of which FTE	Of which operational	CKM unit activity package
Project comms set: project wiki and website		4,360	4,360		No. 9
Project basic comms set up: flyers, posters (4) web set up, CGSpace		2,450	2,450		No.s 7, 8 and 9
Project outputs: news (9), reports (4), briefs (8), articles (5)		36,550	21,550	15,000	
Project engagement: events, media		18,900	15,875	3025	No.s 3 and 4
CKM plan (as per PMF)		4,800	4,800		
Materials, supplies and services		15,000		15,000	
Total costs		82,060	49,365	33,025	
		75K=1 FTE, or 0.5 FTE for 2 years			
Project general comms coordination and delivery → add 1% of total budget (or 0.1 FTE per 500K) per year for additional NRS comms time					

Additional product costs (voluntary)

Product/ activities	on demand	Total required	Of which FTE	Of which operational	CKM unit activity package
Project news support		1,450	1,450		No. 1
Wiki/ workspace set and initial support		800	800		
Wiki: recurring annual subscription and support		370	370		No.2
Small event: design, facilitation, reporting (excl. travel, lodgings, etc.)		2,450	2,450		No. 3 and 4
Medium-sized event: design, facilitation, reporting (excl. travel, lodgings, etc.)		3,950	3,950		
Large event: design, facilitation, reporting (excl. travel, lodgings, etc.)		5,500	5,500		
Major media campaign: messaging and organization with Burness (excl. travel, lodgings, etc.)		15,950	3,950	12,000	
Social media campaign: messaging and organization		5,500	5,500		No. 6
High profile video (excludes travel, lodgings, etc.)		7,200–16,900			
Photofilm: produce and publish online (excl. travel, lodgings, etc.)		1,050	1,050		No. 7
Short video: produce and publish online (excl. travel, lodgings, etc.)		1,300	1,300		
Documentary: produce and publish online (excl. travel, lodgings, etc.)		2,450	2,450		
Exhibit for event: design and mount (excl. travel, lodgings, etc.)		1,050	525	525	
Research report: copy edit and design; digital only		2,200	2,200		
Manual: copy edit and design; digital only		2,200	2,200		
Extension: edit and design; digital only		350	350		
Project profile/ flyer		500	500		
Project posters		50	50		
Policy/ research brief		800	800		
Project report		1,600	1,600		
CGSpace basic set up and support		500	500		No. 8
Journal article open access fee		3,000		3,000	
Project website: set up, design, initial support		1,100	1,100		No. 9
Website: recurring annual subscription and support		860	860		
Basic info on website		250	250		
To calculate FTE equivalents: divide costs by 75K and spread over years					

Note: Communications prices are subject to change. Please confirm amounts with Finance and/or the CKM team prior to budget preparation.